EXECUTIVE SUMMARY

1. INTRODUCTION

Since deregulation of the nation's commercial airlines more than twenty years ago, scheduled commercial airline service in Arizona has undergone notable change. Smaller and more rural communities in Arizona have been most noticeably impacted by changes in commercial airline service since deregulation. Concurrently with these changes has come statewide recognition related to the economic significance and importance of scheduled commercial airline service. While the economy of each state is, to some extent, linked to the availability of scheduled commercial airline service, commercial airline service in Arizona is particularly important due to the high level of tourism that supports Arizona's economy.

2. ECONOMIC CONTRIBUTION

A recent study, The Economic Impact of Aviation in Arizona, 1998, by the Arizona Department of Transportation (ADOT) showed that when all benefits related to businesses that support commercial airline activity and to visitors who arrive in Arizona via a scheduled commercial airline are measured, commercial airline activity has a substantial impact on the State's economy. Visitors arriving on commercial airlines and on-airport businesses supporting commercial airline activities are responsible for over 75,081 jobs throughout Arizona. These jobs have an estimated annual payroll that exceeds $1.7 billion. Activities related to commercial airports in Arizona and to the visitors who arrive via these airports account for over $5.6 billion in annual economic activity. This means that for every person who boards a commercial airline flight in Arizona, an estimated $650 in annual economic activity transpires.

These figures help to demonstrate the importance of commercial airline service to Arizona's smaller communities, not just from the standpoint of transportation, but also from the standpoint of local, regional, and statewide economies. Recognizing both the important transportation and economic roles that commercial airline service plays in Arizona, the Aeronautics Division undertook a study to identify opportunities for improving service to smaller communities throughout the State; this report summarizes the findings of that study.

3. ARIZONA'S AIR SERVICE ENVIRONMENT

Scheduled commercial airline service in Arizona is influenced by numerous factors. While some of these factors relate to the characteristics of the State, others relate to events in the airline industry which are more national in their scope and impact. The commercial airline industry is continually changing; with change can come opportunity. One of the primary objectives of the Arizona Air Service Study is to provide data on both a statewide and local basis that can be used to respond to

opportunities for new or improved commercial airline service. New and/or improved commercial airline service to communities analyzed in the Arizona Air Service Study will be affected by several important factors. These factors include the following:

- Low volumes of passenger traffic at study airports
- Limited number of airline connecting hubs that are within traditional range of regional/commuter aircraft from study airports
- Significant level of commercial airline service available at larger, competing airports, most notably Phoenix Sky Harbor International
- Shift of regional/commuter carriers to jet equipment and to aircraft with larger seating capacities
- Significant level of passenger demand that is discretionary in nature, leading to greater sensitivity

These, and other factors influence the economic feasibility of improving commercial airline service to airports analyzed in the Arizona Air Service Study. Since a primary objective of the study was to identify air service improvements that could realistically be implemented, these factors were weighed and considered accordingly in developing this study's final recommendations.

4. STUDY AIRPORTS

The Arizona Air Service Study was undertaken by the Arizona Department of Transportation, Aeronautics Division, in the summer of 1998. The study focused on identifying viable opportunities to improve scheduled commercial airline service at 10 Arizona airports that presently have commercial airline service, and three additional airports that once supported commercial airline service and could have the ability to support such service again. While Phoenix and Tucson both have a significant level of commercial airline service, the focus of this analysis was on smaller, more rural commercial airline markets within Arizona.

Airports analyzed in the study that presently have scheduled commercial airline service include facilities serving Bullhead City, Flagstaff, Grand Canyon, Kingman, Lake Havasu City, Page, Prescott, Show Low, Sierra Vista, and Yuma. The three additional airports that were analyzed to determine their ability support new service included facilities serving Safford, Sedona, and Winslow.

5. STUDY METHODOLOGY

The primary objective of the Arizona Air Service Study was to identify opportunities for improving scheduled airline service to and from the study airports. An underlying premise for this analysis was that all service improvements identified should be economically viable from the viewpoint of any

carrier who would be a candidate to provide the identified service. To accomplish this objective, the air service analysis was undertaken in a series of separate but interrelated tasks.

Efforts were undertaken to gather data on each of the communities served by study airports. These efforts included surveys of the traveling public and travel agents throughout the State. Meetings were also held in conjunction with each study airport to obtain local input related to air service concerns and issues. Secondary data sources were reviewed to obtain information on current service levels and travel patterns, existing and historic passenger volumes, and top travel destinations. As this information was available, it was collected and documented for each of the study airports.

Data obtained were used to establish theoretical and actual service areas for each of the study airports. Determining service areas was important to understanding how the airports compete with one another, as well as with larger, more distant commercial airports both within and beyond Arizona. Establishing an actual market area for each of the study airports was also essential to determining the total level of unconstrained demand for commercial airline travel that is associated with each airport.

The study identified total annual volumes of commercial airline travel that are associated with each study airport. These levels of total unconstrained demand levels represent all commercial airline travelers, both residents of Arizona and visitors to the State, associated with each airport. Existing enplanements for study airports, that presently have scheduled airline service, were used to show the percent of total demand for commercial airline travel that each study airport currently captures. Recognizing that passengers from Arizona's smaller market areas will continue to leave their local market areas to begin their airline travel from larger, competing commercial airports, estimates of potential demand were also developed. Potential demand estimates represent realistic enplanement levels for each study airport, thus giving continued competition for passengers.

Potential demand estimates were then analyzed using a computer model to determine the ability of each study airport to support new or improved commercial airline service. Results of the route analysis formed the basis of the study's final recommendations. Specific follow-on activities for individual communities and the State were documented in the study's action plan.

6. DATA GATHERING

Comprehensive diagnostics effort was the first step in analyzing opportunities for improving commercial airline service to study airports. As part of this diagnostics effort, a series of meetings were held throughout the State to provide each community the opportunity to provide direct input into the study. These meetings provided businesses, airlines, airport management, tourism representatives, community leaders, economic development interests, and others a forum to discuss air service issues and concerns specific to their community.

Passenger surveys were conducted to gather information from both residents of Arizona and visitors to the State who are using existing service at each of the study airports. Travel agents in proximity

to the study airports were also contacted to provide additional insight for each community. Information obtained from the diagnostics effort included:

- Size of each airport's actual market area
- Percentage of air travelers using the local airport, as opposed to a more distant competing airport
- Reasons for passenger erosion from each local market
- Attraction of Arizona air travelers to out-of-state airports
- Air service improvements desired by each study airport

Information obtained from the diagnostics effort was used in the technical analysis of the Arizona Air Service Study

7. SERVICE AREAS

According to the Federal Aviation Administration (FAA), a typical service area for an airport that is served by regional/commuter airlines is a 60 minutes drive time. In the highly competitive airline environment, however, many smaller airports have found it difficult to attract passengers within their "theoretical" service areas. When faced with competition from larger airports, many small commercial service airports have "actual" service areas that are substantially smaller than their theoretical service area. Such is the case for most of the Arizona study airports.

As a result of competition from Phoenix, Tucson, Las Vegas, and to a lesser extent, Los Angeles, the radius for passenger attraction is much smaller than 60 minutes for most study airports. Results of this diagnostics effort showed that not only do the study airports compete with larger, more distant commercial service airports, but also with one another. For example, passenger and travel agent survey results show that Bullhead City, Lake Havasu, and Kingman often compete for the same passengers as do Flagstaff, Grand Canyon, and Prescott.

8. AIRPORT COVERAGE

Results of the diagnostics effort showed that Arizona air travelers usually have several choices for a departure airport. In most cases, both resident and visitor-related air travelers are using an Arizona airport to begin or end their commercial airline travel. For communities in the northwestern portion of the State, however, a measurable level of passenger erosion to Las Vegas International takes place. Diagnostic efforts also showed that some passenger diversion from the Yuma service area takes place to Los Angeles. A small number of air travelers also reportedly exit the State to begin their commercial airline travel from Albuquerque.

Survey results indicated that a relatively small number of commercial airline travelers from neighboring states use commercial airports in Arizona to begin their airline trips. These same survey results also showed, however, that study airports loose a significant portion of the demand that is associated with their local markets to both Phoenix and Tucson, but primarily to Phoenix. When service areas for the State's commercial airports are considered, along with the additional coverage that is provided by airports in neighboring states, all major population centers, and almost all of the State, geographically fall within a one to two-hour radius of one or more commercial service airports.

9. DEMAND FOR COMMERCIAL AIRLINE TRAVEL

The demand for commercial airline service is influenced by a number of factors. These factors include total population, income levels, employment levels, type of employment, age of population, tourism, and other similar factors. Each of the study airports annually record the level of enplanements, the number of airline travelers that board at that particular airport. It is important for each airport to understand the number of total passengers that are associated with their service area and the percentage of that which is lost through passenger erosion to competing airports.

Based on the factors noted above, each service area has a level of total unconstrained demand for commercial airline travel. Each study airport's current level of annual enplaned passengers represents the percentage of the airport's total unconstrained demand for commercial air travel that it presently captures. The ability of each study airport to capture the demand for commercial airline travel in its service area is based on a number of factors such as the type of aircraft that serves the airport, the number of daily flights, the cost and reliability of the service, and the proximity of larger competing airports.

10. POTENTIAL DEMAND

This study's diagnostic efforts show that there are numerous reasons why air travelers leave the service area of their local airport to begin commercial airline trips from more distant, competing airport. For study airports throughout Arizona, reliability of service and fares are reportedly the primary reasons for passenger erosion. Other factors that contribute to passenger erosion include size of the aircraft that serves the airport, the frequency with which service is provided, the number of airlines which provide service, scheduled arrival and departure times, the availability of non-stop versus connecting flights, and the connecting hubs that are served.

Due to the proximity of Phoenix, Tucson, and Las Vegas to the study airports, continued passenger erosion can be expected, even if viable service improvements are implemented throughout the State. Each study airport's level of competition to determine what percentage of its total unconstrained demand for commercial airline travel it may be able to capture, given reasonable service improvements. This level of demand is referred to in the study as "potential" demand. Potential demand estimates for each of the study airports were used in the route analysis to determine new or improved service that may be supported at each study airport.

11. ROUTE ANALYSIS

A computerized model was used to evaluate commercial air service opportunities for each of the study airports. Analysis focused on identifying air service improvements that could be supported if each study airport's existing commercial airline service stayed in place and continued to capture each airport's existing level of annual enplanements. As a result of the level of demand associated with several of the study airports, many will remain candidates for service only with smaller, traditional turboprop regional/commuter aircraft. The few number of airline connecting hubs in proximity also limits additional air service opportunities for many of the study airports.

In some instances, the route analysis revealed that existing service could be enhanced to existing connecting hubs either through more flights or with aircraft with larger seating capacities. For some airports, the route analysis demonstrated the airport's ability to support new service to an additional airline hub. Results of the route analysis showed that each study airport's ability to improve its commercial airline service varies. Further, circumstances at some of the study airports indicated that follow-on efforts will be needed solely to focus on maintaining existing commercial airline service. Opportunities for improving commercial airline service for each of the study airports are discussed below.

A. Bullhead City/Laughlin

Existing service to this market consists of four daily round trip flights on the Beech 1900 to Phoenix. Estimates of potential passenger demand for this market, however, indicate if the airport is able to capture a higher percentage of its unconstrained demand for commercial airline travel, scheduled airline service to an additional hub appears economically feasible. Results of the route analysis show that Bullhead City/Laughlin may be capable of supporting either three or four daily round trip flights on a Boeing 737 aircraft to either Los Angeles or Las Vegas. In addition, the route analysis shows that with potential demand levels, not only can this market support new service to either Los Angeles or Las Vegas, but it can also support upgraded service to Phoenix. Results of the route analysis showed that the airport may be capable of supporting up to eight daily round trips to Phoenix on a Dash-8 aircraft.

RECOMMENDATION: Work with incumbent carrier to secure larger aircraft and increased flight frequency to Phoenix. Determine, on the local level, whether service to Las Vegas or to Los Angeles best meets the community's needs and prepare further analysis and marketing strategies to attract a carrier that would provide service to a second hub.

B. Flagstaff

Scheduled commercial airline service in this market consists of eight daily flights to Phoenix using both the Beech 1900 and the Dash-8-200B. In addition to service to Phoenix, the route analysis model showed that if potential demand levels are captured, this airport may also be capable of supporting scheduled airline service to either Las Vegas or Los Angeles. Using

a 30-passenger Embraer aircraft, the route analysis model indicated that seven daily flights between Flagstaff and Las Vegas would be economically viable. On this same route, a total of six daily round trips could be supported operating the Canadair Regional Jet. As an alternative to new service to Las Vegas, the route analysis indicated that with potential demand estimates, Flagstaff could support six economically viable round trips per day on the 30-passenger Embraer to Los Angeles or five daily round trips on the Canadair Regional Jet. In addition to supporting new service to an additional hub, either Las Vegas or Los Angeles, the route analysis indicated that the Flagstaff market may also be capable of supporting improved service to Phoenix. If new service were provided to Las Vegas, 10 daily round trips on the Dash-8 between Flagstaff and Phoenix could be supported. If new service to Los Angeles were implemented, 11 daily round trips between Phoenix and Flagstaff would be financially feasible.

RECOMMENDATION: Work with current carrier to upgrade all flights to Phoenix to the Dash-8 aircraft and to increase the daily frequency of these flights. Take local initiatives to determine if additional airline service to Las Vegas or Los Angeles is best suited to the community and take further action to attract additional scheduled airline service to one or the other of these two airline hubs.

C. Grand Canyon

Grand Canyon National Park Airport currently does not have regularly scheduled commercial airline service. The airport is, however, served by a large number of charter carriers. Results of the route analysis showed that non-Canyon related passenger demand should be able to support up to three profitable daily round trips between the airport and Phoenix. This service would be provided on the Beech 1900 aircraft.

RECOMMENDATION: The airport should work with carriers who would be candidates to provide regularly scheduled commercial air service between the Grand Canyon and Phoenix.

D. Kingman

Kingman's current commercial airline service is subsidized through the EAS program. In addition, flights that originate in Kingman stop in Prescott before continuing on to Phoenix. A Beech 1900 is presently used to serve the market, and four daily "shared" round trips are provided on this aircraft. This study's potential demand estimates indicate that if Kingman were served as a stand alone market without subsidy, it would have the ability to support only one profitable round trip flight on the Beech 1900 to Phoenix. This finding indicates that without EAS subsidy and commercial aircraft with smaller seating capacities, scheduled commercial airline service in this market could be at risk.

RECOMMENDATION: This market does not appear to have sufficient passenger demand to support profitable commercial airline service. It appears that continued operating subsidies will be required to maintain service in this market. Steps on the local level should include exploratory talks with other communities who may need to rely on smaller 9-passenger aircraft and on identifying local funding sources in the event that the federal EAS program is curtailed or eliminated.

E. Lake Havasu City

Lake Havasu City currently has four daily round trip flights on the Beech 1900 to Phoenix. The route analysis indicated that with potential demand levels identified for this market, the aircraft could be upgraded to a Dash-8 with four daily round trips continuing to be supported. If service were provided to Las Vegas instead of Phoenix, the route analysis indicated that five daily round trips on a 30-passenger Embraer aircraft or six daily round trips on a Beech 1900 could be supported. The route analysis indicated that if existing service to Phoenix is maintained on the Beech 1900 at its current frequency, Lake Havasu City has only limited capability to support service to a second airline hub; only one daily round trip to Las Vegas is economically viable according to model results. Potential demand levels for this market indicated that focusing service on one hub may be preferable to splitting passenger demand between two airline hubs.

RECOMMENDATION: Focus on maintaining and improving service to Phoenix. Work with the incumbent carrier to increase the number of daily flights on the Beech 1900 between Lake Havasu City and Phoenix or work to maintain the current daily round trip flight frequency of four and seek to obtain service on the Dash-8 aircraft. The latter of these efforts may serve this community better in the long-term as carriers retire the19-seat aircraft.

F. Page

Page presently has scheduled commercial airline service to Phoenix; this service is provided on the Beech 1900 at a frequency of three daily round trips. Using potential demand estimates developed in this study, the route analysis model indicated that this market may be able to support six daily round trips to Phoenix on the larger Dash-8 aircraft. If the smaller Beech 1900 continues to provide the service between Page and Phoenix, the model indicated that eight daily round trips appear economically viable. The route analysis indicated that the level of service between Page and Phoenix on the Beech 1900 could be increased to four daily round trips and that sufficient demand could also be available to support three daily round trips on the 30-passenger Embraer to Las Vegas. For Page, either improved service to Phoenix appears viable or current Phoenix service could be maintained and additional service to Las Vegas implemented. It is important to note that existing service to Page is subsidized through the EAS program; this indicates that achieving potential passenger demand estimates for this market may be difficult.

RECOMMENDATION: Efforts on the local level should be taken to increase ridership to a level that scheduled airline service can be supported without operating subsidies. While this community theocratically has the ability to support service to an additional hub, given its history, it may be more prudent for the community to first work with its incumbent carrier to increase flight frequency and to implement the use of aircraft with higher seating capacities on the route between Page and Phoenix.

G. Prescott

Prescott's existing commercial air service to Phoenix is linked with service that originates at Kingman. Commercial airline service at both Kingman and Prescott is presently subsidized through the EAS program. There are four daily round trips to Phoenix on the Beech 1900 that are shared by these two markets. If Prescott were able to capture all of its potential passenger demand, the route analysis indicated that Prescott could support four daily round trips on the larger Dash-8 aircraft or six daily round trips on the Beech 1900 to Phoenix. Again, assuming that Prescott is capable of capturing its potential enplanement estimate, the market's current service (three daily round trips to Phoenix on the Beech 1900) could be maintained and additional service (two flights per day on the Beech 1900) could be implemented to Las Vegas.

RECOMMENDATION: Current airline service in this market is linked with Kingman. As its number one priority, the community should work to increase its enplanements with two goals in mind. One being to support airline service which is independent of another community and the other to attract a level of demand that results in profitable service, independent of operating subsidies. The community should initially focus on securing larger aircraft and an increased frequency of daily flights to Phoenix before pursuing other air service improvements that may be possible.

H. Safford

Although Safford is currently without scheduled commercial airline service, it was examined for its ability to support financially self-sufficient airline operations in the near future. The route analysis showed that, based on potential demand levels estimated for this market, only one daily round trip on the Beech 1900 to Phoenix could be operated at a profit. By serving the market with a smaller aircraft such as the nine passenger Beech King Air and reducing service from seven to six days a week, the Safford market could support two profitable round trip flights per day.

RECOMMENDATION: There does not appear to be sufficient demand in this market to support a modest level of scheduled commercial airline activity which is economically self-sustaining. If commercial airline service is a priority in this market, the community may wish to explore the Show Low model and should identify local funding sources to subsidize airline service.

I. Sedona

Scheduled commercial airline service is not presently available in this market, but its notable level of tourism indicates that potential demand levels may be sufficient to support at least a modest level of scheduled airline service. Using the nine-passenger Beech King Air and a six day per week flight schedule, the route analysis indicated that Sedona may be capable of supporting three profitable daily round trips to Phoenix.

RECOMMENDATION: Sedona should also consider following the Show Low model if the community determines that commercial airline service is a priority. The level of demand identified for this market and competition from other commercial airports indicated that local financial support may be required to initiate and sustain commercial airline service. This market does not appear to be a candidate for the larger regional/commuter carriers that operate in Arizona.

J. Show Low

Three flights per day on the Beech King Air are currently provided between Show Low and Phoenix. Results of the route analysis for this market showed that if service were upgraded to a Beech 1900, only one round trip per day would be financially feasible. Based on the market's estimated demand potential, three daily round trips between Show Low and Phoenix on the nine-passenger Beech King Air appear to be profitable. This indicates that existing service is well matched to the market's characteristics.

RECOMMENDATION: The market's existing approach to providing commercial airline service appears to be well-matched to the community's capabilities for supporting scheduled service. The community's pragmatic approach to providing access to the nation's air transportation system should serve as a model for other small communities examined in this study.

K. Sierra Vista

Existing scheduled commercial airline service to this market consists of five round trips per day to Phoenix on the Beech 1900. Among study airports, Sierra Vista is somewhat unique. It has the most significant level of passenger erosion among all study airports, and its geographic location within Arizona limit its ability to be connected to either Las Vegas or Los Angeles by turboprop aircraft. The route analysis for this market focused accordingly on its ability to support improved commercial airline service to Phoenix. If Sierra Vista were able to capture its potential demand, the number of round trips to Phoenix on the Beech 1900 could theoretically be increased from the current level of five to seven.

RECOMMENDATION: This community should work with its incumbent carrier to upgrade the size of the aircraft serving the market while maintaining the current flight frequency. Demand levels in this market are borderline for being able to support larger turboprop aircraft, but a larger aircraft cannot be supported at the market's current daily flight frequency. If larger aircraft are used in this market, flight frequencies would need to be reduced or local operating subsidies provided.

L. Winslow-Holbrook

Winslow is presently without scheduled commercial airline service. Several different route analyses were undertaken for this market to examine its ability to support profitable commercial air travel. Results of the route analysis indicated that by operating the nine-passenger Beech King Air on a six day per week schedule, the market could support one profitable round trip to Phoenix.

RECOMMENDATION: Demand in this market may not warrant the pursuit of scheduled commercial airline service. The Show Low model for commercial airline service would have a difficult time succeeding in this market. If commercial airline service is pursued, a local source for subsidization of airline service should be identified as a first step.

M. Yuma

Yuma is the only study airport that presently has regularly scheduled airline service to two hubs, those being Los Angeles and Phoenix. Results of the route analysis indicated that Yuma can support improved service to both of its existing hubs. Service to Los Angeles is presently provided on a 30-passenger aircraft at a frequency of five round trips per day. The route analysis showed that Yuma is capable of supporting 9 daily round trips on a 30-seat aircraft to Los Angeles or 7 daily round trips on a 50-passenger regional jet. Service to Phoenix now consists of six daily round trips; this service is provided by a mix of Dash-8 and Beech 1900 aircraft. The route analysis also showed that Yuma can support up to five profitable daily round trips to Phoenix, all on the larger Dash-8 aircraft.

RECOMMENDATION: Yuma should work with its incumbent carriers to increase its frequency of daily service to both Los Angeles and Phoenix. In addition, Yuma should work with its carriers to obtain service on larger aircraft to both of its existing hubs.

12. FINDINGS AND CONCLUSIONS

Results of the Arizona Air Service study identified several opportunities for attracting improved scheduled commercial airline service at some of the study airports in the near future. The study also, however, concluded that some study airports could be at risk of losing their existing airline service and that there is only a limited probability of initiating and supporting commercial airline service at additional airports in the State.

There are several factors which have the propensity to impact both existing and improved commercial airline service at most study airports. All study airports will continue to experience passenger erosion. For all study airports, the existing passenger erosion rate is estimated at 72 percent, however, if improved service can be attracted, the rate of passenger erosion could in theory be reduced to 50 percent. Experience has shown that large airports typically have more notable service improvements, making it difficult for smaller and more rural airports to effectively cut their passenger erosion rates. It is important to note that all the identified improvements in scheduled commercial airline service in the Arizona Air Service Study are predicated upon each airport capturing higher demand levels. If resident and visitor-related air travelers continue to use the highway to drive to more distant airports for commercial airline travel, service improvements identified by the route analysis are not feasible. A statewide program to educate and encourage air travelers to use existing airline service at study airports is considered vital to the success of potential air service improvements identified in this study.

Scheduled commercial airline service to Kingman, Page, and Prescott is currently federally subsidized through the EAS program. Continued or new airline service to these communities, as well as to other study airports, could be contingent upon the continuance of the federal EAS program or upon the identification of similar local funding sources. Passenger volumes at several of the study airports have been and will continue to be able to support profitable self- sustaining service on 19-passenger or smaller aircraft. Within the airline industry as a whole, however, there is general movement away from the 19-seat aircraft. This trend may jeopardize continued or new service to several study airports.

Similar to many communities in western states, scheduled commercial airline service to the Arizona communities included in this study is limited, to some extent, by the fact that airports are beyond the effective stage length of turboprop aircraft and that passenger volumes are often too low to make the airports viable candidates for service by new generation turboprop or jet aircraft that are being acquired by the regional/commuter carriers. Circumstances within Arizona may prompt some communities to band together to support future commercial airline service. The example set by Show Low, in terms of a community acquiring its own aircraft to ensure service, may well serve as a future model for other Arizona communities.

Initiatives to sustain and improve commercial airline service can only be successful when they are formulated and supported on the local level. Given the competitive nature of many of the airline markets within Arizona, the Department of Transportation is not in a position to support or promote airline service at one airport over another. Further, financial resources do not exist on the State level to fully and equally provide operating subsidies to all communities within the State that may require this type of assistance to maintain or improve airline service. Airport specific opportunities for improving commercial airline service identified in this study must be implemented from the bottom up, not the top down. While the Arizona Department of Transportation can continue to function as a technical resource and a source of funds for physical facilities that may be required to support commercial airline service, communities that seek to implement study recommendations must gather

strong local support and possibly financial commitment if commercial airline service is truly a transportation and economic priority.